Centers for Medicare & Medicaid Services

CMS.gov Quick Reference Guide - Completing Annual Certification

March 30, 2016

Version 1.0 Final

Table of Contents

1. Introduction

This guide provides an overview of CMS.gov Annual Certification process within Enterprise Identity Management (EIDM). This document includes step-by-step instructions for Approvers to use to certify the users under their approval authority.

2. Annual Certification

Starting January, 2016 the Centers for Medicare and Medicaid Services (CMS) will enforce the Annual Certification requirement for all applications supported by EIDM.

Annual Certification is the annual recurrence of the role approval process. Role approval is the process used by the Business Owners, their representatives, Authorizers, Help Desks, or other Approvers to grant an application role to a user who is requesting the role.

CMS.gov provides a means to record the Annual Certification actions taken for two types of roles:
   a. **Manually Approved Roles** – The original role request requires manual approval by the user who has the appropriate authorizing role.
   b. **Validated Roles** – The original role request requires that EIDM compare and validate user provided data to data maintained in a trusted resource (validation check).

When a role fails certification, it is removed from the user's profile.
   a. Manually approved roles can fail certification either because the Approver selected 'Revoke' for the user's role, or because the Approver took no action prior to the Annual Certification due date.
   b. Validated roles can fail because the user provided data does not match the data in the trusted resource on the Annual Certification due date.

The Annual Certification due date is the date that a role is due to be certified. Annual Certification is not a certification of a User Identifier (UID) or a User's Account.

   a. The Annual Certification due date for manually approved roles is one year after the create date for the first certification, and one year after the certification date each year thereafter.
   b. The Annual Certification due date for validated roles is June 1 every year.

The Annual Certification process for any given role is the sole responsibility of the application and their Approvers. This guide explains the Approvers' responsibility with regards to Annual Certification for both the manually and validated roles.

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3. Certifying Manually Approved Roles

Approvers for manually approved roles have the ability to search for, certify, or revoke the roles assigned to the users under their authority any time they choose via the 'Annual Certification' page. However, if they do not take an action by the certification due date, then their users' role(s) will be revoked.

This section lists the step-by-step instructions that an Approver must take to certify or revoke their users' access as part of Annual Certification.

The certification process is initiated with an email notification that is sent to the Approver. The notification email will provide instructions for completing the certification for users under their authority.

<table>
<tr><td colspan="2" align="center">Certifying Manually Approved Roles
An Approver for manually approved roles will receive an email notifying them that users under their authority are pending Annual Certification. The initial email will be sent 30 days prior to the certification due date for users requiring manual approval. Reminder emails will continue to be sent to the Approver 15, seven, and one day prior to the certification due date.

Please follow steps 1 to 20 to certify pending users' roles for Annual Certification.</td></tr>
<tr><td>Steps</td><td>Screenshots</td></tr>
<tr><td>

1. Review the email notification that lists the number of roles pending certification. Follow the instructions in the email to access the "Pending Certifications" page to certify users' access.

Note: The roles pending certification requests listed in the email will provide you the number of pending certifications that require your action in the specified number of days.

</td><td>

Email to Approvers - Manual Approval

From: <donotreply@cms.gov>
Date: Fri, Nov 20, 2015 at 4:29 PM
To:
Subject: Action Required: CMS.gov Users' Pending Annual Certification.

This is to inform you that some of your users in the <Application Name> Application for which you are responsible are due for Annual Certification of their roles.

You have 237 roles pending certification in the next 30 days.
You have 210 roles pending certification in the next 15 days.
You have 203 roles pending certification in the next 7 days.
You have 0 roles pending certification in the next 1 day.

To review the pending certifications, please do the following:

1. Login to CMS.gov using the link given below.
2. Navigate to the page where you approve role requests.
3. Select the 'Annual Certification' link.
4. In the 'Pending Certification' view select the user for whom you wish to take an action. If you do not find the user in the 'Pending Certification' view, select the 'Search Users' tab to search for the user.
5. 'Certify' the user if you wish to retain the user's role in the application.
6. 'Revoke' the user if you wish to remove the user's role in the application. This will be effective immediately.

Note: If you fail to take any action, the users' role(s) will be removed on the certification due date for that role(s).

If you are accessing CMS.gov from CMS Net, Go to <CMS NET URL>.
If you are accessing CMS.gov from the Internet, Go to <Internet URL>.

Thank you,
CMS.gov
Please do not reply to this system-generated E-mail.

</td></tr>
</table>

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2. Go to https://portal.cms.gov/ and select **Login to CMS Secure Portal**. **Note***: The CMS Enterprise Portal supports the following internet browsers:* • *Internet Explorer 8, 9, 10, and 11* • *Mozilla-Firefox* • *Chrome* • *Safari* *Enable JavaScript and adjust any zoom features to ensure you are not missing part of the screen because the view is too wide.*	

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3.	Read **Terms and Conditions** and select *I Accept* to continue.	**Terms and Conditions** Health Care Quality Improvement System Provider Resources **Terms and Conditions** OMB No.0938-1236 | Expiration Date: 04/30/2017 | Paperwork Reduction Act You are accessing a U.S. Government information system, which includes (1) this computer, (2) this computer network, (3) all computers connected to this network, and (4) all devices and storage media attached to this network or to a computer on this network. This information system is provided for U.S. Government-authorized use only. Unauthorized or improper use of this system may result in disciplinary action, as well as civil and criminal penalties. By using this information system, you understand and consent to the following: You have no reasonable expectation of privacy regarding any communication or data transiting or stored on this information system. At any time, and for any lawful Government purpose, the government may monitor, intercept, and search and seize any communication or data transiting or stored on this information system. Any communication or data transiting or stored on this information system may be disclosed or used for any lawful Government purpose. To continue, you must accept the terms and conditions. If you decline, your login will automatically be cancelled. [I Accept] [Decline]
4.	Enter your *User ID* and select *Next*.	**Log In** **CMS.gov** | Enterprise Portal Centers for Medicare & Medicaid Services Home | About CMS | Newsroom | Archive | Help & FAQs | Email | Print Health Care Quality Improvement System Provider Resources **Welcome to CMS Enterprise Portal** User ID [_____] [Next] [Cancel] Forgot User ID? Need an account? Click the link - New user registration

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5. Enter your *Password* and select *Log In.*	

Approvers can access the Annual Certification User Interface (UI) in the same location where they go to approve or reject role requests. Depending on which applications and roles an approver belongs to, the Approver can access this interface via either "My Actions" or "My Access".

This section includes steps to access the Annual Certification UI via "My Access" page. Refer to the steps listed in Appendix B for accessing this interface via "My Actions" Page. To find out which path an Approver should take to access the Annual Certification UI, refer to the table in Appendix A, which lists the Applications and the method to access this interface.

6. Select *My Access* in the drop down menu at the top right corner of the Welcome screen. *Note: Approvers accessing the "Pending Approvals" UI via **My Actions**, please refer to Appendix B.*	

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7. Select *Other Actions* on the **My Access** page. *Note: The following screenshots show details of an approver with Electronic Correspondence Referral System (ECRS) Web user role in ECRS Web certifying users under their authority.*	**Other Actions**
8. You will be navigated to the **View and Manage My Access** page. Select the link for *Annual Certification* on the left pane. *Note: Approvers accessing the "Pending Approval" UI via **My Actions** will select the link for **Annual Certification** under the **My Actions** page. Please refer to Appendix B.*	**View and Manage My Access**
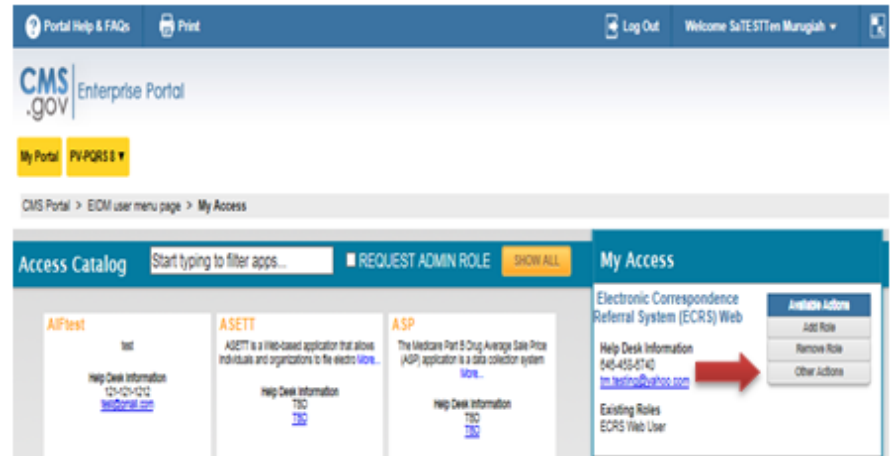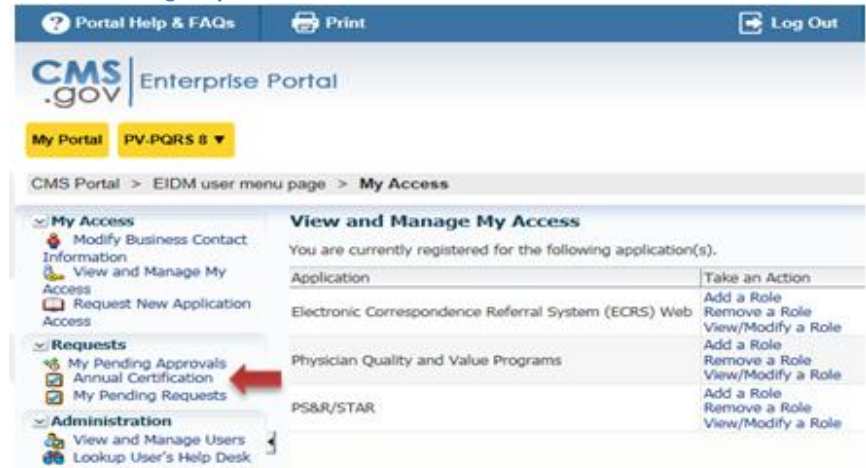
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9.	Select users one by one or in bulk (by selecting the *Select All* button) to Certify or Revoke users' roles. Only users whose roles are due for certification within the next 30 days will be shown initially.	

   You may use the *Search Users* tab to search for users outside the 30 day window or to search for a specific pending certification by UID, User name, etc.

   Follow Steps 13 to 19 to search and certify users using the *Search Users* tab.

   Note: *By default, the Pending Certifications display up to 250 results and are sorted in descending order by the **Next Review Date** column. The Approver can sort the pending certifications using the fields along the columns.*

   *The system uses pagination when displaying results. The ability to toggle through pages can be utilized by selecting the **Up Arrow, Down Arrow, First, Previous, Next,** and **Last** buttons or by entering the desired page number in the **Page** field.*

   *Use **Results per page** to display up to 30 results per page. By default, it will be set to 15.*

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10. Agree to the acknowledgement statement to certify or revoke the selected user(s). Select *Certify* or *Revoke* to complete the pending user's role certification.

> *Note***:** *The ***Certify*** button approves the annual certification of the user's continued use of a role in your application.*
> *The ***Revoke*** button removes the user's role from the application. The user will be notified via email when a role is revoked.*

Agree to the acknowledgement statement

Pending Certifications | Search Users

Pending Certification View

Only the first 250 pending certifications will be displayed. You may search for other certifications using the search tab above.

Results per page : 15

Select All	User ID	First Name	Last Name	Role Name	Approval Based Attribute	Last Review Date	Next Review Date
	EIDMHPTEST60	FName713	LName713	MCU Business Owner Representative			3/23/2016
	HPTEST2603	akjdfkja	ajdkfjka	MCU Business Owner Representative			3/25/2016
	HPTEST2703	adfklakdf	jajfdjj	MCU Business Owner Representative			3/26/2016
	QSSIDEVTESTUSER021	TwentyOneFIRSTGHT	TwentyOneLASTTCK	Helpdesk Tier1			3/26/2016
✓	QSSIDEVTESTUSER039	ThirtyNineFIRSTGHT	ThirtyNineLASTTCK	EPPE Business Owner Representative			3/26/2016
	HPSMOKETEST1	fname6380197	lname6380197	MCU Business Owner Representative			3/29/2016
	REL9ORG010	sxx	scv	ASP Business Owner Representative			3/29/2016
	DSHCUTEST3	fname6379928	lname6379928	MCU Business Owner Representative			3/30/2016
	QHPDEVUSER046	FortySixFIRABC	FortySixLASTAA	Helpdesk Tier1		3/10/2016	3/30/2016
	BAHPTEST001	ANEighAN	fdg	MCU Business Owner Representative			3/31/2016
	VDOSHI	Viral	Doshi	MCU Business Owner Representative			4/5/2016
	EIDMHPTEST77	smoke	KABIRO	MCU Business Owner Representative			4/6/2016
	DSHCUTEST6	fname6379930	lname6379930	MCU Business Owner Representative			4/6/2016
	TUSER101	test	usertwo	MCU Business Owner Representative			4/6/2016

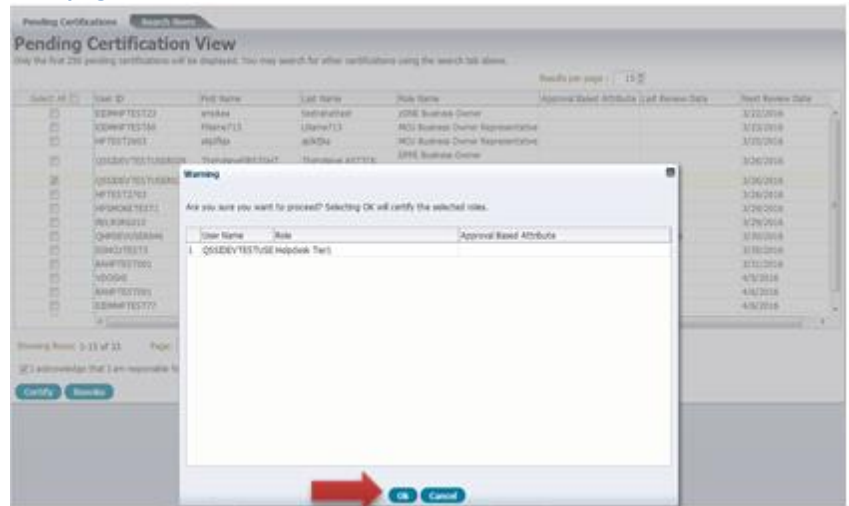ing Rows: 1-15 of 33   Page: 1 of 3   First   Previous   Next   Last

cknowledge that I am responsible for certifying my users continued use of the assigned role to the same standard by which the user was originally authorized.

Certify   Revoke

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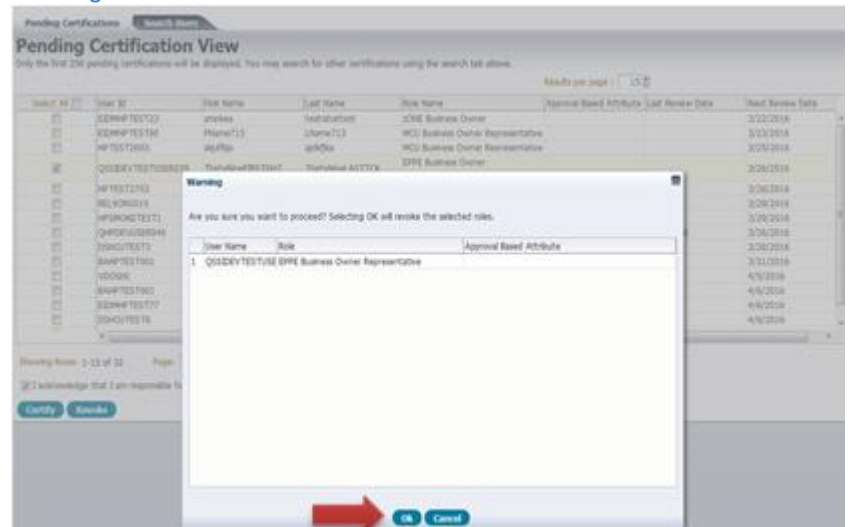
11. You will receive a pop-up confirmation message providing the list of users included for that action. Review the UID, role, and Approver-based information of the pending certifications that are going to certified or revoked. Confirm your action by selecting the *OK* button. Select the *Cancel* button to cancel the action and to return to the **Search Users View** page. *Note: Sample screen shots with the pop-up message are shown for both Certify and Revoke actions.*	**Certifying Users** **Revoking Users**

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12. You will be navigated to the **Pending Certification View** after certifying or revoking the roles for users under your authority. An informational message will be displayed stating the roles have been Certified or Revoked. If there are additional users' roles to be certified, follow steps 1 to 10 to take action. *Note: The view screen will refresh and the **Next Review Date** will be updated for users whose roles were certified. The users' roles which were revoked will no longer be included in the Pending Certifications list.*	**Successfully Certifying Users** **Successfully Revoking Users**

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13. The Approvers' user(s) whose role(s) were removed by the Revoke action will receive an email (a sample of such an email is shown to the right). ***Note:*** *Instructions for users to regain access to the application are provided in the email.* *The Application Helpdesk contact information in the email will still refer to the Application in which the user had the role.*	**Email notifying user of role removal** From: donotreply@cms.hhs.gov [mailto: donotreply@cms.hhs.gov] Sent: Monday, October 19, 2015 2:05 PM To: Subject: Your CMS.gov Application Role has been removed. Dear <First Name> <Last Name>, The Centers for Medicare and Medicaid Services (CMS) require that your Role, <Role Name>, in the <Application Name> Application be approved each year. This email is to notify you that your Application Approver has removed your role. If you wish to regain access to your application please request the role again by logging into the CMS.gov Enterprise Portal at <portal landing page URL> . If you need additional assistance contact your <Application Name> Help Desk at <ApplicationHelpdesk email> or call <ApplicationHelpdesk phone number>. *Thank you,* *CMS.gov* *Please do not reply to this system generated E-mail.*

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Approvers can select the *Search Users* tab to search pending certifications for users' roles under their approval authority. Users whose roles are due for certification matching the search criteria will be populated in the search results. The following screenshots provide step-by-step instructions for searching pending certifications and taking action on the search results.

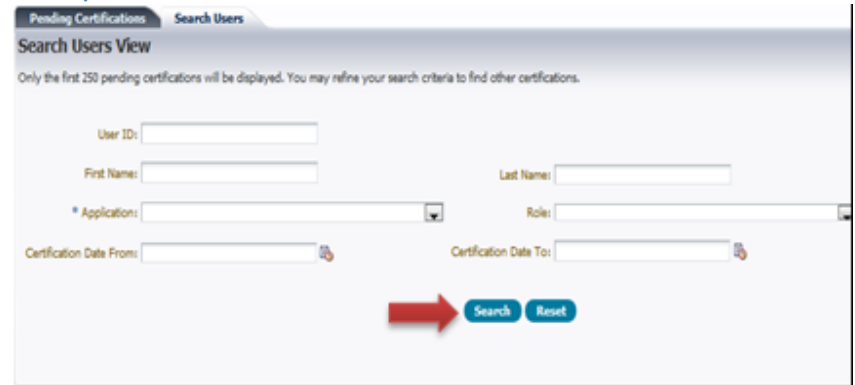|	
14. Approvers can search for pending role certifications of users' under their approval authority by providing the search criteria on the **Search Users View** page. *Note: The following characters are not allowed in any of the search fields: Asterisk (*), Percentage (%), Double quotation mark ("), Ampersand (&), Cap (^), Less-than sign (<), and Greater-than sign (>).* *UID*, *First Name*, and *Last Name*: *Enter a minimum of 2 characters in the search field.* *Application*: *This is a mandatory field if you are an approver for more than one application. Please select the application. If you are an approver for only one application, the application name will be pre-selected by default and will be grayed out.* *Role: This is an optional field and displays the roles within the application which are under your approval authority. If you are an approver for only one role in the application, the role will be pre-selected by default and will be grayed out.* *Certification Date From and To*: *Enter a date in mm/dd/yyyy format, or select a date to search pending certifications. From date cannot be past 365 days from the current date.*	**Search Users View** Pending Certifications	Search Users Search Users View Only the first 250 pending certifications will be displayed. You may refine your search criteria to find other certifications. User ID: _____ First Name: _____ Last Name: _____ * Application: _____ ▾ Role: _____ Certification Date From: _____ Certification Date To: _____ Search Reset

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15. Select *Search* to retrieve a list of users matching the search criteria. To clear the search criteria, select the *Reset* button.	**Search / Reset button** Pending Certifications Search Users **Search Users View** Only the first 250 pending certifications will be displayed. You may refine your search criteria to find other certifications. User ID: [ ] First Name: [ ] Last Name: [ ] * Application: [▾] Role: [▾] Certification Date From: [ ] Certification Date To: [ ] (Search) (Reset)

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16. Review the pending certifications that match your search criteria. Select users one by one or in bulk by selecting the **Select All** button to certify or revoke users' role. *Note: By default, the results are sorted by the **Next Review Date** column. The Approver can sort the search results using the fields along the columns. By default, up to 250 results will be populated. You can see all pending certifications that are due up to the next 365 days.* *The system uses pagination when displaying results. The ability to toggle through pages can be utilized by selecting the **Up Arrow, Down Arrow, First**, **Previous**, **Next**, and **Last** buttons or by entering the desired page number in the **Page** field.* *Use the **Results per page** to display up to 30 results per page. By default, it will be set to 15. The following are the different fields that are displayed in the search results:* **UID**, **First Name**, **Last Name**: *User information of the user who matches the search criteria* **Role Name**: *User role for the user who matches the search criteria* **Approval Based Attribute**: *The role attribute that is provided by the user at the time of role request and is used to identify the Approver and route the request to that Approver.* **Last Review Date**: *The last date Annual Certification was completed.*	**Search Users View Results** **External Validation View**

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Next Review Date*: The next Annual Certification due date.* ***External Validation Error****: Only shows for application roles where the original role request required that EIDM compare and validate user-provided data to data maintained in a trusted resource. It will be displayed only when the trusted resource validation fails.* *Select the double arrow in the top right corner to expand the table view to see all populated columns.*	

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17. Agree to the acknowledgement statement to Certify or Revoke the selected user(s). Select *Certify* or *Revoke* to complete the pending user's role certification. *Note: The **Certify** button approves the annual certification of the user's continued use of a role in your application. The **Revoke** button removes the user's role from the application. The user will be notified via email when a role is revoked. The **Cancel** button clears the search and navigates the Approver back to the **Pending Certification View**.*	**Agree to the acknowledgement statement** **Search Users View** Only the first 250 pending certifications will be displayed. You may refine your search criteria to find other certifications. User ID: First Name: Last Name: * Application: Novitasphere Role: Novitas Help Desk User Certification Date From: Certification Date To: Search Reset Results per page : 15

If you have questions about the or need assistance regarding Annual Certification, please contact your Application Help Desk.

18. You will receive a pop-up confirmation message providing the list of users included for that action. Review the UIDs, role, and approver-based information of the pending certifications that are going to certified or revoked. Confirm the action by selecting the *OK* button. Select the *Cancel* button to cancel the action and to return to the **Search Users View** page. *Note: Sample screen shots with the pop-up message are shown for both Certify and Revoke actions.*	**Certifying Users** **Revoking Users**

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19. You will be navigated to the **Search Users View** after certifying or revoking the roles for users under your authority. An informational message will be displayed stating the roles have been certified or revoked. If there are additional users' roles to be certified, or to start a new search, follow steps 13 to 16.	**Successfully Certifying Users** **Successfully Revoking Users**

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20. You will receive an email when either the Approver revokes the role access, or when no action is taken by the Annual Certification due date and the system removes the user's role. *Note: Instructions for regaining access to the application are provided in the email.*	**Email to User - Manually Approved Roles** From: donotreply@cms.hhs.gov [mailto: donotreply@cms.hhs.gov] Sent: Monday, October 19, 2015 2:05 PM To: Subject: Your CMS.gov Application Role has been removed. Dear <First Name> <Last Name>, The Centers for Medicare and Medicaid Services (CMS) require that your Role, <Role Name>, in the <Application Name> Application be approved each year. This email is to notify you that your Application Approver has removed your role. If you wish to regain access to your application please request the role again by logging into the CMS.gov Enterprise Portal at <portal landing page URL> . If you need additional assistance contact your <Application Name> Help Desk at <ApplicationHelpdesk email> or call <ApplicationHelpdesk phone number>. Thank you, CMS.gov *Please do not reply to this system generated E-mail.*

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4. Validated Roles

This section provides sample email notifications received by the Approver, Business Owner, and End User when validated roles do not pass account validation as part of Annual Certification. Please note that validated roles are certified by the system, and approvers need not take any action in certifying or revoking the roles. The next level Approvers and Business Owner of an application are notified about the users who failed the validation check. Please refer to the Introduction section of this document for an explanation and additional details on this type of certification.

Validated Roles require that EIDM compare and validate user provided data (data provided at the time of role request) against the data maintained in a trusted resource (Validation Check). When Validation Check fails because of the user data not matching data in the trusted resource, an Approver or Business owner will receive an email notification.

Please see steps 21 to 23, to view email notifications for Validated Roles pending Annual Certification.

Function	Sample Email
21. Approvers who are responsible for users with validated roles will receive the initial email 90 days prior to the Annual Certification due date. This email will include the users and roles which failed the validation check. Reminder emails will continue to be sent if the user(s) did not pass the validation check 60 days, 30 days, seven days, and one day prior to the Annual Certification due date. *Note: If the user's account failed validation check by the certification due date, their role will be removed and the user will be notified by email.* *If the user's account passed validation check, then the role passed Annual Certification until the next certification due date. No emails are sent to either users or Approvers in this case. Approvers are responsible for taking action to correct data in the trusted resource by the certification due date.*	**Email to Approver - Validated Roles** **From:** "donotreply@cms.gov" <donotreply@cms.gov> **Sent:** Monday, November 23, 2015 10:06 AM **To:** **Subject:** Action Required: Your CMS.gov application users' auto approved roles have failed validation You are receiving this notification because some of your users for which you are either directly or indirectly responsible for, failed an external data source validation as part of Annual Certification. The user details are attached. Please ensure that the validation data matches for these users. If no corrective action is taken the user(s) will fail Annual Certification and their role(s) will be removed on the certification due date for that role(s) Thank you, CMS.gov Please do not reply to this system generated E-mail.

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22. Approvers who are responsible for users who have validated role(s) will receive an email informing them of their users' role removal, when a validated role fails Annual Certification due to failing the validation check. *Note: Instructions for regaining access to the application are provided in the email.*	**Email to Approver - Validated Roles** **From:** <donotreply@cms.gov> **Date:** Fri, Nov 20, 2015 at 4:29 PM **To:** **Subject:** Your CMS.gov users' roles have been removed. The following Users', for whom you are listed as the Business Owner or Approver, have failed Annual Certification and their role(s) have been removed. The user details are attached. Users who wish to regain access to their applications can request the role again by logging into CMS.gov using the link given below and requesting the desired role. If you are accessing CMS.gov from CMS Net, Go to <CMS NET URL>. If you are accessing CMS.gov from the Internet, Go to <Internet URL>. Thank you, CMS.gov Please do not reply to this system generated E-mail.

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| 23. Users with validated roles who failed Annual Certification will receive an email notifying the user of their role being removed.

Note: Instructions for regaining access to the application are provided in the email. | **Email to User - Validated Roles**
From: <donotreply@cms.gov>
Date: Fri, Nov 20, 2015 at 4:29 PM
To:
Subject: Your CMS.gov Application Role has been removed.

Dear <First Name> <Last Name>,

The Centers for Medicare and Medicaid Services (CMS) require that your Role, <Role Name>, in the <Application Name> Application be approved each year. This email is to notify you that your role has not been approved and has been removed.

If you wish to regain access to your application please request the role again by logging into CMS.gov using the link given below and requesting the desired role.

If you are accessing CMS.gov from CMS Net, Go to <CMS NET URL>.
If you are accessing CMS.gov from the Internet, Go to <Internet URL>.

If you need additional assistance contact your <Application Name> Help Desk at <Application Helpdesk email> or <Application Helpdesk phone number>.

Thank you,
CMS.gov
Please do not reply to this system generated E-mail. |

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5. Account Review

This section provides a brief overview of the account review process for CMS.gov applications.

Account Review is a process of checking the users' accounts for the existence at least one (1) Application Role.

Function	Explanation/Sample Email
24. EIDM automatically performs calendar-driven account reviews in March and October, as shown in the chart to the right. *Note: Refer to Appendix C for an explanation of the included terms (i.e., locked, inactive, etc.)*	**Account Review Chart** | EIDM Checks performed (In order)	Result	Next Step/Action Taken
---	---	---
Does the account have a role?	Yes	Account review passes. No further action is required.
	No	Proceed to the next step.
Has the account been inactive for less than 180 days?	Yes	Account review passes. No further action is required.
	No	Proceed to the next step.
Has the account been inactive for 180 days or more but less than 360 days?	Yes	Account Review fails. User is notified by Email and may unlock their account in EIDM to regain access.
	No	Proceed to the next step.
Has the account been inactive for 360 days or more?	Yes	Account Review fails and the account is deleted. The User is notified by Email and may re-register in EIDM.	
25. In the event an account fails review at 180 days, the account will be locked and an email will be sent to the user. *Note: Locked users can unlock their account using the self-service function by answering the challenge questions that they had set up at the time of registration and resetting their password.*	**Email - Account Review 180 Days** **From:** <donotreply@cms.gov> **Date:** Fri, Nov 20, 2015 at 4:29 PM **To:** | **Subject:** Your CMS.gov Account has been locked. Dear <First Name> <Last Name>, The Centers for Medicare and Medicaid Services (CMS) periodically review CMS.gov User Accounts for compliance with CMS security policies. Our records indicate that you do not have a role in any CMS.gov Application and you have not logged into CMS.gov for <number of days of inactivity> days or more. Due to this, your account, <User ID>, has been locked. To unlock your Account, please login to CMS.gov using the link given below and follow the on-screen instructions. If you are accessing CMS.gov from CMS Net, Go to <CMS NET URL>. If you are accessing CMS.gov from the Internet, Go to <Internet URL>. Thank you, CMS.gov Please do not reply to this system generated E-mail.

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26. In the event that an account fails review at 360 days, the account will be deleted and an email will be sent to the user. *Note: The email will include instructions to regain access to CMS.gov by registering for a new user account.*	**Email - Account Review 360 Days** **From:** <donotreply@cms.gov> **Date:** Fri, Nov 20, 2015 at 4:29 PM **To:** **Subject:** Your CMS.gov Account has been deleted. Dear <First Name> <Last Name>, The Centers for Medicare and Medicaid Services (CMS) periodically review CMS.gov User Accounts for compliance with CMS security policies. Our records indicate that you do not have a role in any CMS.gov Application and you have not logged into CMS.gov for <number of days of inactivity> days or more. Due to this, your account, <User ID>, has been deleted. To regain access to CMS.gov and it's Applications you may register for a new Account by accessing CMS.gov using the link given below and selecting the New User Registration link. If you are accessing CMS.gov from CMS Net, Go to <CMS NET URL>. If you are accessing CMS.gov from the Internet, Go to <Internet URL>. Thank you, CMS.gov Please do not reply to this system generated E-mail.

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APPENDIX A: Annual Certification Link

Approvers can access the Annual Certification UI in the same location where they go to approve or reject role requests. Depending on which applications and roles an approver belongs to, the Approver can access this interface via either "My Actions" or "My Access". The figure below shows the path an Approver should take to access the interface, depending on the Application(s) in which he/she has approval roles.

Applications via the 'My Access' page		Applications via the 'My Actions' page	
GENTRAN	CPC	MLMS	ZONE
CSR	ECRS	ASP	ASETT
MDR	CGS	EPPE	MCU
MED	FCSO	SHIM	OPENPAYMENTS
BPX	NSI	IDHD	IC
ISV	PSR	ESD	MACPRO
HPG	PVPQRS		TMSIS
COB	MAMA		
VMS	UCM		
Connexion	ELMO		
eRPT			

Figure 1: Approver Certification Link Usage per Application

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APPENDIX B: Accessing Pending Certification Using My Actions Screenshots

This appendix explains the steps that Approvers must take to access the Pending Certifications UI from the "My Actions" link.

Corresponding with Step 4: Select *My Actions* in the drop down menu at the top right corner of the Welcome screen.	**My Actions**
Corresponding with Step 6: Select the *Annual Certification* link on the **My Actions** page.	**Annual Certification Link**
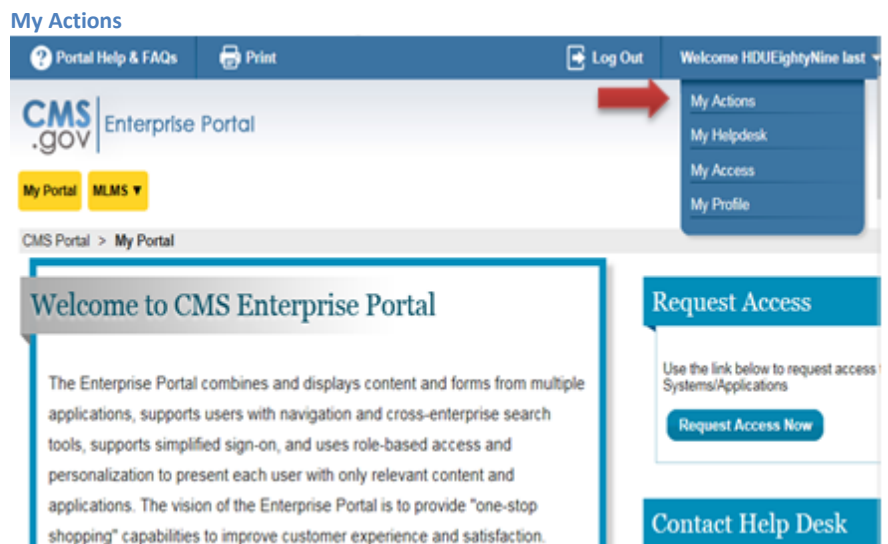
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APPENDIX C: Important Terminology

Below are some important terms related to Annual Certification and account reviews:

- **Inactive** – The user has not logged into either their Application or EIDM for 60 days or more.
- **Locked** – The user is prevented from logging in to any application. They may log in to EIDM.
    - The user's account will be locked following 60 days of inactivity.
    - To unlock an account, the user must log in to EIDM, answer their challenge questions, and reset their password.
- **Deleted** – The user's account may no longer be used for any purpose. The user must register again.
    - Account deletion occurs upon failure of account review when both statements below are true:
        - The user's account does not have a role in any application; and
        - The user's account has been inactive for more than 360 days.

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